

Documented Processes and Policy Writing

Allison Palmer, SHIP Quality Improvement Specialist
CHES, PCMH CCE

Outline

- Purpose
- Benefits
- Differences
 - Policy
 - Procedure
- Tips
- Activity
 - Good policy vs bad policy
- Resources

Before we get started...



Purpose

“Help businesses and organizations to formally set out what they intend to do and the means by which they will carry out the objectives.”

Benefits

- Who are you really writing for?
 - Helps your practice
 - Provides clear guidelines
 - Empowers staff
 - Reduces bottlenecks
 - Audits
 - Reimbursements
 - Culture



Policies and Procedures



Differences

POLICY

- “A rule, regulation, and set of guidelines.”
- Establishes
 - Values, ethics, commitments, and social responsibilities
- Safeguards
 - Ethical issues
 - Liability risks
- Guides
 - Decision making
 - Develop procedures
- Time consuming
 - Several steps: writing, reviewing, approving
- High value

PROCEDURE

- Specific
 - Actions or instructions
 - Who
 - What
 - When
 - Where
 - Why
 - How
- Compliance
- Visual road map

General Tips

INCLUDE

- Plain language
 - Find it
 - Understand it
 - Use it
- Pronouns/Active Voice
- Short sentences
 - Break up the idea
 - To the point

EXCLUDE

- Jargon
 - Complex or fancy vocabulary
 - Acronyms
 - Write it out the first time
- Passive voice
- Long sentences

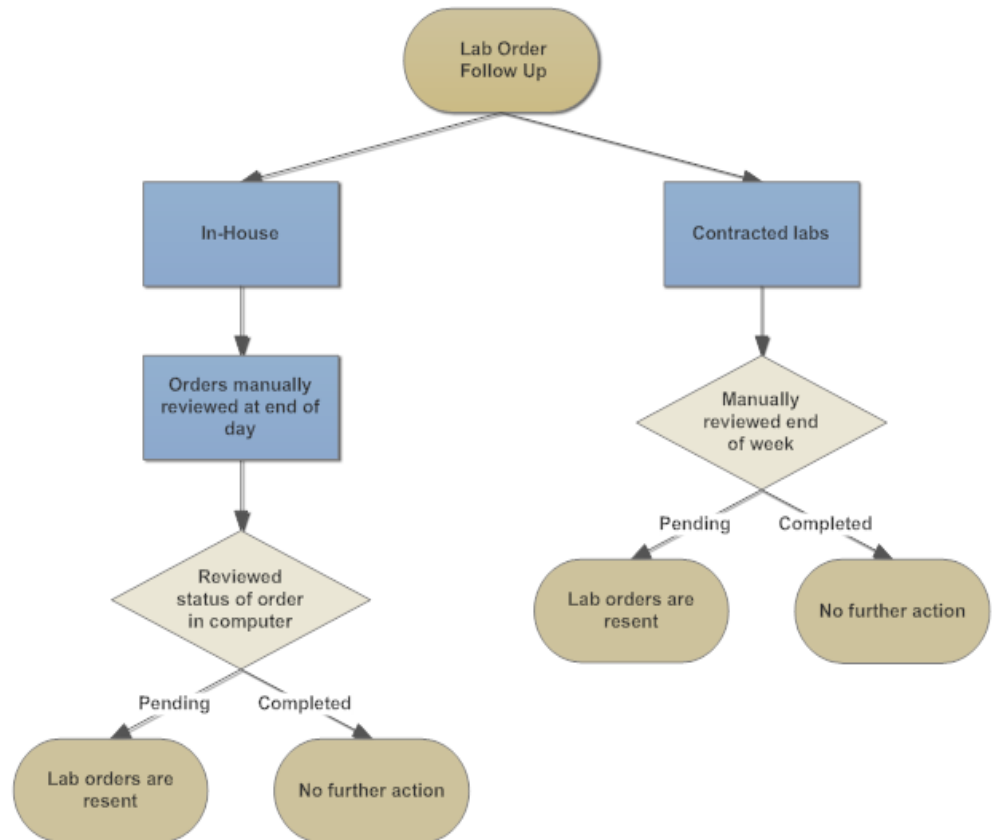
Formatting Tips

- Standardize
- Logo
- Legal disclaimer
 - (if needed)
- Policy numbers
 - Tracking



Other Tips

- Embed
 - Visuals
 - Workflow process
 - Lists
 - Steps
 - Tables



Recognition Tips

PRACTICE

- Recognition Timeline
 - Know your goals
 - Time for implementing new policies
 - Testing
 - Process and estimated time frame for policy approval

NCQA

- Include:
 - Practice name
 - Important dates
 - Created, implemented, and revised
 - Criteria
- For your NCQA reviewer:
 - Page numbers
 - Link one to multiple criteria
 - Submit
 - **ALL** documented processes for first virtual check-in
 - **Avoid**
 - Submitting a new process at last virtual check in
 - NCQA reserves the right to hold it

More Tips

- Access
- Shared space
 - Shared drive
 - Sharepoint- Office 365
 - Cloud based products
- Be aware of the “paper tiger”
 - Wastes
 - Effort
 - Time
- Regular review



Activity



Example 1



Example 2



Example 3



Example 4



Best Resources

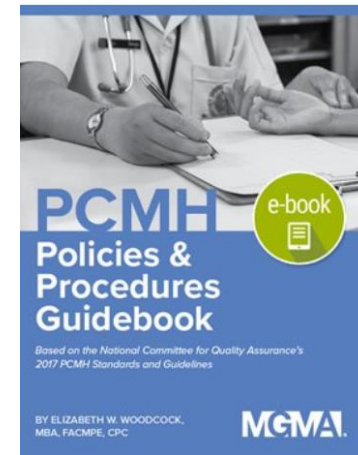
you.

Local Resources



Other Resources

- ❑ Medical Group Management Association (MGMA)
- ❑ <https://www.mgma.com/store/books/electronic/pcmh-policies-procedures-guidebook-3rd-edition-ebook>
- ❑ Policy Tech
 - ❑ <https://www.navexglobal.com/en-us/products/policytech-policy-procedure-management-software>



POLICYTECH®
Policy & Procedure Management

Questions



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